Chapter 5 Retention Model

Keeping current members is just as necessary as recruiting new members if clubs are to remain viable and effective. Many clubs don’t realize they have a retention problem because the number of members in their club has remained relatively steady. However, clubs that are routinely losing members (for reasons other than relocation) and making up for this by inducting an equal number of new members are not effectively managing their club’s growth.

**Objectives**

• Determine club’s ability to retain members. Calculate a club’s net membership gain (or loss) over a specified time period and determine its source: existing or new members.

• Determine a club’s ability to retain members, and establish ways to

address retention weaknesses and maintain strengths.

**Time**

30-45 minutes for person completing model; 1 hour of discussion (club membership committee); 20-30 minutes of discussion during a club meeting

**Preparation**

• Have a club leader with access to membership records review those records and determine whether they provide the necessary information for this exercise.

• If induction and termination dates are missing, access a more

detailed retention model at [www.rotary.org.](http://www.rotary.org/)

**Materials**

• Membership records

• Calculator

• Computer

This model is to be completed by a member of the club leadership team with access to membership records. The club membership committee and all club members should be included in a discussion of what the *completed* model illustrates.

**Retention Model**

Start Date

# Members

# New members inducted

# Existing members terminated

% Existing members terminated

# Existing members active

# New members active

# New members terminated

% New members terminated

End Date

# Members % Net gain/loss

**Creating Your Retention Model**

1. Establish the time frame you wish to study by entering a **Start Date** in the top box of the retention model and an **End Date** in the bottom box. (We recommend a time frame between three and five years.)

2. In the **Start Date** box, enter the number of active members who were in the club on that date.

3. In the **End Date** box, enter the number of active members who were in the club on the end date and calculate the **% Net gain/loss** by:

(*End Date* number of members – *Start Date* number of members) \* 100 = *% Net gain/loss*

*Start Date* number of members

4. In the **Existing members terminated** box, enter the number of members who were active on the start date but terminated before the end date and calculate the **% Existing members terminated** by:

*Existing members terminated* \* 100 = *% Existing members terminated*

*Start Date* number of members

5. Calculate the number of **Existing members active** by:

*Start Date* number of members – *Existing members terminated* = *Existing members active*

6. In the **New members inducted** box, enter the number of new members inducted between the start date and end date.

7. In the **New members terminated** box, enter the number of new members who were terminated before the end date and calculate the **% New members terminated** by:

*New members terminated* \* 100 = *% New members terminated*

*New members inducted*

8. Calculate the **New members active** by:

*New members inducted* – *New members terminated* = *New members active*

9. Once you know who constitues you club’s net membership gain or loss, you can begin to identify the club’s retention strengths and weaknesses.

10. Photocopy your completed retention model, and take it to a club membership committee meeting to discuss. Following that discussion, hand out copies of the model to all club members during a meeting and facilitate a discussion about ways to address weaknesses and maintain strengths.

*Note:* The number of members at the **End Date** should equal the number of **Existing members active** plus the number of **New members active**.